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## 7. Participant Search, Folder and Summary

### 7.1 Participant List

The initial window of the WIC system allows the user to reach all functions of the system, including the Participant Folder, Caseload Management, Manage Inventory, System Outputs and System Tools. The Participant List creates the foundation of the WIC State Office application. This document describes the various functions for searching and displaying the participant list. The Participant list can be sorted and displayed in several ways.

This criterion is the current view of the participant list. The current view is an Agency level view initially set upon login of the system.

The title bar and columns of each window will change to reflect the selected View.

**State Office - Participant List - Statewide**

File Participant List Activities Help

**Where to Search**

☐ On-site  
☐ Local  
☒ Statewide  
☐ Appointments for Today

**Demographics**

☐ State WIC ID  
☐ Household ID  
☐ PAN#

Last Name  Date of Birth

First Name  MI  SSN

Agency

Program

State WIC ID	Household ID	Last Name	First Name	MI	Date of Birth	WIC Category
			RANDA	M	08/14/1980	Non-breastfeeding
			TAYLOR	B	01/09/2005	Child
			KASE	H	10/27/2006	Child
			KARLA	G	08/26/2004	Child
			MARIA		11/15/1966	Non-breastfeeding
			RIGOBERTO		05/02/2007	Infant
			YESENIA		12/01/1987	Non-breastfeeding
			CHASE		04/10/2002	Child
			JADEN	C	04/27/2004	Child
			JONATHON		02/20/2000	Child
			MARIA		04/05/1970	Non-breastfeeding
			SHYANNE	J	03/12/2004	Child
			SIERRA	N	01/02/2002	Child
			JESSE	R	03/31/1998	Child
			CHRISTOPHER		03/10/2003	Child

3/7/2008 11:11 AM

Figure 1 - Participant List (Details Hidden)

**State Office - Participant List - Statewide**

File Participant List Activities Help

**Where to Search**

☐ On-site  
☐ Local  
☒ Statewide  
☐ Appointments for Today

Program: **WIC**

**Demographics**

State WIC ID:   
 Household ID:   
 PAN#:

Last Name:  Date of Birth:   
 First Name:  MI:  SSN:   
 Agency:

Search Clear Show Details

State WIC ID	Household ID	Last Name	First Name	MI	Date of Birth	WIC Category
			ABBI		02/23/2007	Infant
			ALICIA	Y	03/07/1980	Pregnant
			APRIL		04/14/1974	Non-breastfeeding
			GRADY	L	04/04/2005	Child
			HALEY		03/28/2006	Child
			RACHEL		06/21/1988	Breastfeeding
			TRENTON	L	01/08/2003	Child
			BLAINE		12/09/2002	Child

WIC Category: **Infant**  
 Gender: **Female**  
 Next Appointment: **N/A**  
 Telephone: **N/A**

Certification Effective: **02/04/2008**  
 Certification End: **08/04/2008**  
 Termination Date: **N/A**  
 Termination Reason: **N/A**

Last Date to Use: **N/A**  
 Issued: **04/04/2008**  
 Issued: **03/04/2008**  
 Issuance Frequency: **Bi-monthly**

3/22/2008 2:59 PM

Figure 2 - Participant List (Details Shown)

## 7.1.1 Controls

This section describes the behavior of the controls on the Participant List window.

### 7.1.1.1 Where to Search Radio Button Group

The radio button group consists of the following buttons:

- On-site
- Local
- Statewide
- Appointments for Today

The radio button group is disabled when the window is active.

### 7.1.1.2 Program Drop-down

The control allows the user to indicate which Program database to include in the search criteria. This drop-down will always display the 'WIC' program. Additional programs is displayed if applicable to your state requirements.

#### ***7.1.1.3 State WIC ID Radio Button and Masked Edit Box***

The radio button is enabled when the Participant List is active. When this radio button is selected, the State WIC ID masked edit box is enabled. Otherwise the masked edit box is disabled. It allows the entry of alphabetic and numeric characters.. The mask for the box is "#####". If less than the maximum number of digits is entered into the masked edit box, it will be padded with preceding zeros.

#### ***7.1.1.4 Household ID Radio Button and Masked Edit Box***

The radio button is enabled when the Participant List is Active. When this radio button is selected, the Household ID masked edit box is enabled. Otherwise, the masked edit box is disabled. It allows the entry of alphabetic and numeric characters. The mask for the box is "#####". If less than the maximum number of digits is entered into the masked edit box, it will be padded with preceding zeros.

#### ***7.1.1.5 PAN# Radio Button***

The control allows the selection of the PAN (Primary Account Number) as the search criteria. It is enabled when the Electronic Benefit Transfer (EBT) food delivery system is enabled for the clinic and the Participant List window is active. (For more information about enabling the Electronic Benefit Transfer (EBT) food delivery system, see the Update Clinic Dialog section of [Application Administration Chapter 09 - Reference Utility](#).)

##### ***7.1.1.5.1 PAN# Text Box***

The control accepts a PAN by which to search for a participant. It is enabled when the radio button is selected. Characteristics for the PAN# text box are defined in the [Consistencies](#) chapter.

NOTE: Multiple PANs may be linked to the Household EBT Account, since cards become deteriorated or are lost. The search will result in the household linked to the card number.

#### ***7.1.1.6 Demographics Radio Button***

The radio button is enabled when the Participant List is Active. When this radio button is selected, the demographic controls become enabled. Otherwise, the Demographic controls is disabled.

#### ***7.1.1.7 Demographics - Last Name Text Box***

The control allows the user to enter a complete or partial last name as search criteria. The text box will be enabled when the Demographic radio button is selected. The maximum length allowed for the value is twenty-five (25) characters. It allows the entry of alphabetic characters, spaces, and the following special characters: { ' , - }. Alphabetic characters are converted to uppercase.

#### ***7.1.1.8 Demographics - First Name Text Box***

The control allows the user to enter a complete or partial first name as search criteria. The text box will be enabled when the Demographic radio button is selected. It allows the entry of alphabetic characters, spaces, and the following special characters: { ' , - }. Alphabetic characters are converted to uppercase. The maximum length allowed for the value is twenty (20) characters.

#### ***7.1.1.9 Demographics - Middle Initial Text Box (MI)***

The control allows the user to enter the middle initial as search criteria. The text box will be enabled when the Demographic radio button is selected. It allows the entry of alphabetic characters. Alphabetic characters are converted to uppercase. The maximum length allowed for the value is one (1) character.

#### ***7.1.1.10 Demographics – SSN Masked Edit Box (SSN)***

This control allows the user to enter the social security number as search criteria. The masked edit box is enabled when the Demographics radio button is selected and the [HideSSN](#) business rule is set to "N". It allows the entry of numeric characters. The mask for the box is "###-##-####". If the [HideSSN](#) business rule is set to "Y", the masked edit box will not be visible.

#### ***7.1.1.11 Demographics – Date of Birth Masked Edit Box***

The control allows the user to select the Date of Birth as search criteria. The masked edit box is enabled when the Demographics radio button is selected. It allows the entry of numeric characters. The mask for the box is "####/####/####" to accept a date with a four digit year.

#### ***7.1.1.12 Search button***

The Search button will be enabled when the Participant List window is active. Its mnemonic is 'S'

#### ***7.1.1.13 Clear button***

The Clear button will be enabled when the Participant List window is active. Its mnemonic is 'C'

#### ***7.1.1.14 Show/Hide Details button***

The Show/Hide button will be enabled when the Participant List window is active. Its mnemonic is 'D'

#### ***7.1.1.15 Participant List Grid***

The control allows the user to select the appropriate participant with which to work.

The participant list will be initially sorted by Last Name, First Name, and Middle Initial. The first entry is initially selected. The participant list grid will contain the following columns:

- State WIC ID
- Household ID
- Last Name
- First Name
- Middle Initial (MI)
- Date of Birth
- WIC Category
- Gender
- Agency Number
- Clinic Number

Double-clicking on a participant's record in the grid will open the participant folder for the selected participant.

#### ***7.1.1.16 Detail Panel - WIC Category Text and Value Label***

This control is displayed when the Show Details panel is active. The control allows the user to view the WIC Category at the most recent certification for the participant selected in the participant list. The value label will invoke the lookup value corresponding to the WIC-Status column of the MEMBER table. It will invoke as read-only in the inverse color of the form. Note that this control does not get focus and is not included in the tab order of the dialog.

#### ***7.1.1.17 Detail Panel - Gender Text and Value Label***

This control is displayed when the Show Details panel is active. The control allows the user to view the gender of the participant selected in the participant list. The value label will invoke the lookup value corresponding to the Gender column of the MEMBER table. It will invoke as read-only text in the inverse color of the form. Note that this control does not get focus and is not included in the tab order of the dialog.

#### ***7.1.1.18 Detail Panel - Next Appointment Text and Value Label***

This control is displayed when the Show Details panel is active. The control allows the user to view the Next Appointment for the participant selected in the participant list. The value label will invoke the lookup value corresponding to the AppointmentDate column of the APPOINTMENT table where AppointmentDate is equal to or greater than today's date and less than the AppointmentDate for any other appointment scheduled for the participant. It will invoke as read-only text in the inverse color of the form. Note that this control does not get focus and is not included in the tab order of the dialog.

#### ***7.1.1.19 Detail Panel - Telephone Text and Value Label***

This control is displayed when the Show Details panel is active. The control allows the user to view the primary telephone number for the household of the participant selected in the participant list. The value label will invoke the lookup value corresponding to the Telephone1 column of the HOUSEHOLD table. It will invoke as read-only text in the inverse color of the form. Note that this control does not get focus and is not included in the tab order of the dialog.

#### ***7.1.1.20 Detail Panel - Certification Effective Text and Value Label***

This control is displayed when the Show Details panel is active. The control allows the user to view the effective date of the most recent certification period for the participant selected in the participant list. It will invoke as read-only text in the inverse color of the form. The value label will invoke the lookup value corresponding to the CertificationEffectiveDate column of the CERTCONTACT table. Note that this control does not get focus and is not included in the tab order of the dialog.

#### ***7.1.1.21 Detail Panel - Certification End Text and Value Label***

This control is displayed when the Show Details panel is active. The control allows the user to view the end date of the most recent certification period for the participant selected in the participant list. It will invoke as read-only text in the inverse color of the form. The value label will invoke the lookup value corresponding to the CertificationEndDate column of the CERTCONTACT table. Note that this control does not get focus and is not included in the tab order of the dialog.

#### ***7.1.1.22 Detail Panel - Termination Date Text and Value Label***

This control is displayed when the Show Details panel is active. The control allows the user to view the termination date for the participant selected in the participant list. If the Terminated column of the MEMBER table is 'Y', the value of the Terminated-Date column of the MEMBER table will be invoked. If the Terminated column of the MEMBER table is not 'Y', the text, "N/A" will be invoked. It will invoke as read-only text in the inverse color of the form. Note that this control does not get focus and is not included in the tab order of the dialog.

#### ***7.1.1.23 Detail Panel - Termination Reason Text and Value Label***

This control is displayed when the Show Details panel is active. The control allows the user to view the termination reason for the participant selected in the participant list. When a date is invoked in the Termination Date field, the value label will invoke the description from the ReferenceDictionary table where column CATEGORY = 'TERMREASON' associated with the value of the Cert-Termination-Reason column of the CERT-CONTACT table. If "N/A" is invoked in the Termination Date field, the value label will invoke "N/A". It will invoke as read-only text in the inverse color of the form. Note that this control does not get focus and is not included in the tab order of the dialog.

#### ***7.1.1.24 Detail Panel - Last Date to Use Group Box***

This group box is displayed when the Show Details panel is active. This group box contains the Last Use Date printed on the WIC checks issued to the selected participant. It also allows the user to view the issuance frequency for the selected participant.

##### **7.1.1.24.1 Detail Panel - Last Date to Use Value Labels**

This control is displayed when the Show Details panel is active. The control allows the user to view the Last Use Date printed on the checks issued to the selected participant. The value label will invoke the value of the Last-Check-LDTU column of the MEMBER table. It will invoke as read-only text in the inverse color of the form. Note that this control does not get focus and is not included in the tab order of the dialog.

##### **7.1.1.24.2 Detail Panel - Issuance Frequency Text and Value Label**

This control is displayed when the Show Details panel is active. The control allows the user to view the issuance frequency of the participant selected in the participant list. The value label will invoke the value of the look up value of the IssuanceFrequency column of the MEMBER table. It will invoke as read-only text in the inverse color of the form. Note that this control does not get focus and is not included in the tab order of the dialog.

### **7.1.2 Processes**

This section describes the processes (navigation) that take place as a result of the actions taken on the Participant List window.

#### ***7.1.2.1 Initializing the Interface***

Upon initial presentation of the window:

- The title part text will be set to "State Office - Participant List - Statewide"
- The Where to Search radio button group defaults to Statewide and is disabled.



- The Program drop-down defaults to "WIC"
- The State WIC ID radio button is initially selected and the masked edit box is blank.
- The Participant List grid is initially blank
- The Show Details panel is initially hidden
- If the [HideSSN](#) business rule is set to "N", the SSN masked edit box is visible. If the [HideSSN](#) business rule is set to "Y", the SSN masked edit box is not visible.

#### *7.1.2.2 Edits for Search Criteria*

Upon selection of the Search button

- When the State WIC ID radio button is selected and an entry is not made in the State WIC ID field, a standard error dialog is invoked with the text, "An entry is required for the State WIC ID."
- When the Household ID radio button is selected and an entry is not made in the Household ID field, a standard error dialog is invoked with the text, "An entry is required for the Household ID."
- When the PAN# radio button is selected and an entry is not made in the PAN # field, a standard error dialog is invoked with the text, "An entry is required for the PAN #."
- When the Demographics radio button is selected, an entry is not made in at least one of the following controls:
  - Last Name text box
  - First Name text box
  - Middle Initial text box
  - Date of Birth masked edit box
  - SSN

The system invokes a standard error message with the text, "An entry is required for at least one of the Demographics fields to perform a search."

- If an invalid date is entered in the Date of Birth masked edit box, a standard error dialog is invoked with the text, "Invalid date entered."
- If the value entered into the Date of Birth masked edit box is greater than the system date the system will invoke a standard error message with the text 'Date entered must be less than or equal to today's date.'

#### *7.1.2.3 Display Participant List*

Upon successful completion of the above listed edits:

- If the Demographics radio button is selected, a soft search combined with a Soundex search is performed on the SPIRIT database using the values in the Last Name and First Name boxes. (For example, if the user performs a search on the Last Name of 'PATTER', a combined Soundex and soft search would yield results similar to the following: PADDER, PADDERSON, PATTER, PATTERSON, POTTER, POTTERSON, POTTERS.) A hard search is performed on the SPIRIT database using the values in the MI, Date of Birth, SSN, and Agency controls.
- If the PAN# radio button is selected, the PAN is relayed to the J.P. Morgan (JPM) Electronic Benefits Transfer (EBT) system, and a hard search is performed on the JPM database to retrieve the Household ID associated with the PAN. The Household ID is then used to perform a hard search of the SPIRIT database for participants with a matching ID.
- If any other radio button is selected, a hard search is performed on the SPIRIT database using the value in the associated box.

The system displays all records found meeting the criteria in the Participant List Grid.

If no records are found that meet the search criteria, a standard message dialog is invoked with the text, "No participant matching your search criteria could be found " Upon dismissal of the message, focus is returned to the Participant List window preserving the previously entered search criteria.

#### ***7.1.2.4 Clear***

Upon selection of the Clear button, the system will clear and reset all controls on the Participant List window.

#### ***7.1.2.5 Show Details***

Upon selection of the Show Details button, the system will display the details for the selected participant in the Show Details panel.

#### ***7.1.2.6 Hide Details***

Upon selection of the Hide Details button, the system will hide the Show Details panel.

#### ***7.1.2.7 Saving the Data***

There are no updateable controls on this window; therefore no data is saved to the database.

#### ***7.1.2.8 Data Map***

There are no updateable controls on this window; therefore no data is saved to the database.

## 7.2 Menus

The menus presented on the Participant List window provide mouse and keyboard functionality to functions within the State Office application. It includes the following menus:

- File
- Participant List
- Activities
- Help

### 7.2.1 File Menu

This File menu contains menu items for invoking the various global features of the State Office application. Its mnemonic is 'F'. When hovering over or selecting a file menu item, if a sub-list of items is available, the sub-list will automatically expand and be invoked. It includes the following menu items:

- File
  - System Outputs
  - System Tools
  - Exit

#### 7.2.1.1 System Outputs Menu Item

The menu item allows the user to invoke the System Outputs function. This menu item will be enabled when the File menu is active. Its mnemonic is 'O'.

#### 7.2.1.2 System Tools Menu Item

The menu item allows the user to invoke the System Tools function. This menu item will be enabled when the File menu is active. Its mnemonic is 'S'.

#### 7.2.1.3 Exit Menu Item

The menu item allows the user to exit the State Office application. This menu item will be enabled when the File menu is active. Its mnemonic is 'X'.

### 7.2.2 File Menu Processes

Upon selecting the System Outputs menu item, the system will expand the sub-menu as follows:

- System Outputs
  - Reports (mnemonic of 'R')

Upon Selection of the Reports menu item, the Generate Reports dialog defined in [State Office Chapter 08 – System Outputs](#) is invoked.

Upon selecting the System Tools menu item, the system will expand the sub-menu as follows:

- System Tools
  - Change Password (mnemonic of 'P')  
Upon selection of the Change Password menu item, then system will invoke the Change Password dialog defined in Security.
  - Set Default Printers (mnemonic of 'D')  
Upon selection of the Set Default Printers menu item, the Select Printers for Workstation dialog defined in System Tools is invoked.

Upon selection of the Exit menu item:

- The system will close and exit the State Office Application.

### 7.2.3 Participant List Menu

This menu contains menu items that allow the user to access functions of the participant list. Its mnemonic is 'P'. The menu will be enabled when the Participant List window is active. It includes the following menu items:

- Participant List
  - Acquire All Missing External IDs
  - Open Participant Folder

#### 7.2.3.1 Acquire All Missing External IDs

TBD

#### 7.2.3.2 Open Participant Folder Menu Item

The menu item allows the user to open a participant's folder. Its mnemonic is 'P'. The menu item will be enabled when the Participant List menu is active and a participant record is selected on the participant list.

This menu item is disabled when the current view of the participant list grid is empty or when no entry is selected in the Participant List grid.

### 7.2.4 Participant List Menu Processes

This section describes the processes (navigation) that take place as a result of the actions taken on the Menu.

- Upon selection of the Acquire All Missing External IDs menu item:
  - TBD

- Upon selection of the Open Participant Folder menu item:
  - A check is performed to determine whether the logged-on user has the appropriate permissions to view the participant folder. When the user does not have the appropriate permissions, a standard error dialog is invoked with the text, "You do not have the necessary permissions to view the Participant Folder. Please see the supervisor."
  - The system will open the Participant Folder for the currently selected household member. The Participant Folder is defined in this document.

## 7.2.5 Activities Menu

This menu contains menu items that allow the user to perform functions on groups of participants. Its mnemonic is 'A'. This menu will be enabled when the Participant List window is active. It includes the following menu items:

- Activities
  - The menu item is determined by the value of the CASELOAD BY SERVICESITE state business rule:
    - If CASELOAD BY SERVICESITE = 'Y', the menu item is, "Clinic Caseload".
    - If CASELOAD BY SERVICESITE = 'N', the menu item is "Agency Caseload".
  - County Caseload
  - Assigned Caseload
  - Calculate Estimated Eligible Caseload
  - Food Instrument Disposition
  - Participant Investigation Results
  - Manage Inventory
  - Manage Consigned Breastpumps
  - Record Replacement Item

### 7.2.5.1 Clinic Caseload / Agency Caseload Menu Item

The function allows the user to invoke the Caseload function for either Clinic or Agency. The menu item is enabled when the system menu bar is accessible. Its mnemonic is 'L'.

### 7.2.5.2 County Caseload Menu Item

The function allows the user to invoke the County Caseload function. Based on the business rule for your state, either County Caseload will appear in the menu. The menu item is enabled when the system menu bar is accessible. Its mnemonic is 'N'.

#### ***7.2.5.3 Assigned Caseload Menu Item***

The function allows the user to invoke the Assigned Caseload function. The menu item is enabled when the system menu bar is accessible. Its mnemonic is 'C'.

#### ***7.2.5.4 Calculate Estimated Eligible Caseload Menu Item***

The function allows the user to invoke the Calculate Estimated Eligible Caseload dialog. The menu item is enabled when the system menu bar is accessible. Its mnemonic is 'U'.

#### ***7.2.5.5 Food Instrument Disposition Menu Item***

The menu item allows the user to invoke the Food Instrument Disposition function. The menu item is enabled when the system menu bar is accessible. Its mnemonic is "I".

#### ***7.2.5.6 Participant Investigation Results Menu Item***

The menu item allows the user to invoke the Participant Investigation Results function. The menu item is enabled when the system menu bar is accessible. Its mnemonic is "P".

#### ***7.2.5.7 Manage Inventory Menu Item***

The menu item allows the user to invoke the Breastfeeding Inventory functions to record an order request for breastfeeding inventory, consign breastfeeding inventory to clinics and print reports related to breastfeeding inventory. The menu item is enabled when the system menu bar is accessible. Its mnemonic is "F" and will not have a short cut key. Upon selection of this item, the Manage Inventory menu is displayed.

#### ***7.2.5.8 Manage Consigned Breastpumps Menu Item***

The menu item allows the user to invoke the Manage Consigned Breastpumps dialog to manage consigned breastpumps and to view breastpumps that have been loaned to specific locations, loan a breastpump to a location, return a loaned breastpump back into the inventory, and to retire a breastpump from inventory. The menu item is enabled when the system menu bar is accessible. Its mnemonic is "D" and will not have a short cut key.

#### ***7.2.5.9 Record Replacement Item Menu Item***

This menu item will allow the user to record that a replacement item was received from the manufacturer. The menu item will be enabled when the Activities menu is active. Its mnemonic is 'R'.

### **7.2.6 Activity Menu Processes**

Upon selection of the Clinic Caseload / Agency Caseload menu item:

- A check is performed to determine whether the logged-on user has the appropriate permissions to view the Clinic Caseload / Agency Caseload dialog. When the user does not have the appropriate permissions, a standard error dialog is invoked with the text, "You do not have the necessary permissions to view {Clinic/Agency} Caseload information. Please see the supervisor."
- The system invokes the Clinic Caseload / Agency Caseload dialog defined in State Office – [Chapter 10 – Caseload Management](#).

Upon selection of the County Caseload menu item:

- A check is performed to determine whether the logged-on user has the appropriate permissions to view County Caseload. When the user does not have the appropriate permissions, a standard error dialog is invoked with the text, "You do not have the necessary permissions to view County Caseload information. Please see the supervisor."
- The system invokes the County Caseload dialog defined in State Office – [Chapter 10 – Caseload Management](#).

Upon selection of the Calculate Estimated Eligible Caseload menu item:

- A check is performed to determine whether the logged-on user has the appropriate permissions to view Clinic Caseload. When the user does not have the appropriate permissions, a standard error dialog is invoked with the text, "You do not have the necessary permissions to view Caseload information. Please see the supervisor."
- The system invokes the Calculate Estimated Eligible Caseload dialog defined in State Office – [Chapter 10 – Caseload Management](#).

Upon selection of the Food Instrument Disposition menu item:

- A check is performed to determine whether the logged-on user has the appropriate permissions to view Food Instrument Disposition. When the user does not have the appropriate permissions, a standard error dialog is invoked with the text, "You do not have the necessary permissions to view Food Instrument Disposition information. Please see the supervisor."
- The system invokes the Food Instrument Search dialog defined in State Office – [Chapter 06 – Food Instrument Disposition](#).

Upon selection of the Participant Investigation Results menu item:

- A check is performed to determine whether the logged-on user has the appropriate permissions to view Participant Investigation Results information. When the user does not have the appropriate permissions, a standard error dialog is invoked with the text, "You do not have the necessary permissions to view Participant Investigation Results information. Please see the supervisor."

- The system invokes the Participant Investigation Results dialog defined in State Office - [Chapter 02 - Participant Investigation Results](#).

Upon selection of the Manage Inventory menu item, the system will expand the sub-menu as follows:

- Manage Inventory (mnemonic of 'I')

Upon selection of the Manage Inventory menu item:

- A check is performed to determine whether the logged-on user has the appropriate permissions to view Breastfeeding Inventory. When the user does not have the appropriate permissions, a standard error dialog is invoked with the text, "You do not have the necessary permissions to view Manage Inventory information."
- The system invokes the Manage Inventory dialog defined in State Office - [Chapter 03 – Inventory Management](#).
- Manage Orders (mnemonic of 'O')

Upon selection of the Manage Orders menu item:

- A check is performed to determine whether the logged-on user has the appropriate permissions to view Manage Orders. When the user does not have the appropriate permissions, a standard error dialog is invoked with the text, "You do not have the necessary permissions to view Manage Orders information."
- The system invokes the Manage Orders dialog defined in State Office - [Chapter 03 – Inventory Management](#).
- Breastfeeding Inventory Reports (mnemonic of 'R')

Upon selection of the Breastfeeding Inventory Reports:

- A check is performed to determine whether the logged-on user has the appropriate permissions to view Breastfeeding Inventory Reports. When the user does not have the appropriate permissions, a standard error dialog is invoked with the text, "You do not have the necessary permissions to view Breastfeeding Inventory Reports information."
- The system invokes the Generate Breastfeeding Inventory Reports dialog defined in [State Office Chapter 03 – Inventory Management](#).
- Product List (mnemonic of 'D')

Upon selection of the Product List menu item:



- A check is performed to determine whether the logged-on user has the appropriate permissions to view Breastfeeding Inventory. When the user does not have the appropriate permissions, a standard error dialog is invoked with the text, "You do not have the necessary permissions to view Product information."
- The system invokes the Product List dialog defined in [State Office Chapter 03 – Inventory Management](#).
- Manufacturer List (mnemonic of 'M')

Upon selection of the Manufacturer List menu item:

- A check is performed to determine whether the logged-on user has the appropriate permissions to view Breastfeeding Inventory. When the user does not have the appropriate permissions, a standard error dialog is invoked with the text, "You do not have the necessary permissions to view Manufacturer information."
- The system invokes the Manufacturer List dialog defined in [State Office Chapter 03 – Inventory Management](#).
- Manufacturer Brand List (mnemonic of 'B')

Upon selection of the Manufacturer Brand List menu item:

- A check is performed to determine whether the logged-on user has the appropriate permissions to view Breastfeeding Inventory. When the user does not have the appropriate permissions, a standard error dialog is invoked with the text, "You do not have the necessary permissions to view Manufacturer Brand information."
- The system invokes the Manufacturer Brand List dialog defined in [State Office Chapter 03 – Inventory Management](#).

- Manufacturer Brand Type List (mnemonic of 'T')

Upon selection of the Manufacturer Brand Type List menu item:

- A check is performed to determine whether the logged-on user has the appropriate permissions to view Breastfeeding Inventory. When the user does not have the appropriate permissions, a standard error dialog is invoked with the text, "You do not have the necessary permissions to view Manufacturer Brand Type information."
- The system invokes the Manufacturer Brand Type List dialog defined in [State Office Chapter 03 – Inventory Management](#).

- Supplier List (mnemonic of 'S')

Upon selection of the Supplier List menu item:

- A check is performed to determine whether the logged-on user has the appropriate permissions to view Breastfeeding Inventory. When the user does not have the appropriate permissions, a standard error dialog is invoked with the text, "You do not have the necessary permissions to view Supplier information."
- The system invokes the Supplier List dialog defined in [State Office Chapter 03 – Inventory Management](#).
- Location List (mnemonic of 'L')

Upon selection of the Location List menu item:

- A check is performed to determine whether the logged-on user has the appropriate permissions to view Breastfeeding Inventory. When the user does not have the appropriate permissions, a standard error dialog is invoked with the text, "You do not have the necessary permissions to view Location information."
- The system invokes the Location List dialog defined in [State Office Chapter 03 – Inventory Management](#).
- Manage Packaging Configurations (mnemonic of 'P')

Upon selection of the Manage Packaging Configurations menu item:

- A check is performed to determine whether the logged-on user has the appropriate permissions to view Breastfeeding Inventory. When the user does not have the appropriate permissions, a standard error dialog is invoked with the text, "You do not have the necessary permissions to view Manage Packaging Configurations information."
- The system invokes the Manage Packaging Configurations dialog defined in [State Office Chapter 03 – Inventory Management](#).

Upon selection of the Manage Consigned Breastpumps menu item:

- A check is performed to determine whether the logged-on user has the appropriate permissions to update breastpump information. When the user does not have the appropriate permissions, a standard error dialog is invoked with the text, "You do not have the necessary permissions to update breastpump information. Please see the supervisor."
- The system invokes the [Manage Consigned Breastpumps](#) dialog defined in this document.

Upon selection of the Record Replacement Item menu item

- A check is performed to determine whether the logged-on user has the BreastfeedingItemIssuance.Add permissions to update breastpump information. If the user does not have the BreastfeedingItemIssuance.Add permissions, a standard error dialog is invoked with the text, "You do not have the necessary permissions to update breastpump information. Please see the supervisor."
- If the user has the BreastfeedingItemIssuance.Add permissions to perform the Record Replacement Item function, the [Record Replacement Item](#) dialog defined in this document is invoked.

### 7.2.7 Help Menu

The Help menu is provided to assist the user in finding answers to questions about how to use the State Office application. This menu item will be enabled when the File menu is accessible. Its mnemonic is 'H'. It includes the following menu items:

- Help
  - Help on Screen
  - WIC Help Topics
  - About

#### 7.2.7.1 Help on Screen

This menu item will allow the user to view panel-level help for the currently invoked screen. This menu item will be enabled when the Help Menu is active. Its mnemonic is 'S' and its shortcut key is 'F1'.

#### 7.2.7.2 WIC Help Topics Menu Item

This menu item will allow the user to view a list of help topics for the WIC system. This menu item will be enabled when the Help Menu is active. Its mnemonic is 'W'

#### 7.2.7.3 About WIC Menu Item

The menu item allows the user to view information about the software. This menu item will be enabled when the Help Menu is active. Its mnemonic is 'A'

### 7.2.8 Help Menu Processes

Upon selection of the Help on Screen menu item, the State Office application panel level help is invoked. This function is also invoked when pressing the F1 key.

Upon selection of the WIC Help Topics menu item, the Help Topics: State Office Help System is invoked with the Index tab displayed.

Upon selection of the About WIC menu item, the About WIC application information dialog is invoked.

## 7.2.9 Toolbar

In addition to the system toolbar options, when the participant list is active several additional toolbar options are available.



Figure 3 - Participant List Toolbar

### 7.2.9.1 Manage Waiting List Toolbar Button

This toolbar button allows the user to manage the waiting list. It is disabled when the Participant List is active. It has a tool tip text of "Manage Waiting List".



Figure 4 - Manage Waiting List Toolbar Button

### 7.2.9.2 System Outputs Toolbar Button

This toolbar button allows the user to invoke the System Outputs function. It will be enabled when the Participant List is active. It has a tool tip text of "System Outputs".



Figure 5 - System Outputs Toolbar Button

### 7.2.9.3 System Tools Toolbar Button

This toolbar button allows the user to invoke the System Tools function. It will be enabled when the Participant List is active. It has a tool tip text of "System Tools".



Figure 6 - System Tools Toolbar Button

### 7.2.9.4 Exit Toolbar Button

This toolbar button allows the user to exit the State Office application. It will be enabled when the Participant List is active. It has a tool tip text of "Exit State Office Application".



Figure 7 - Exit Toolbar Button

#### ***7.2.9.5 Assigned Caseload Toolbar Button***

This toolbar button allows the user invoke the Assigned Caseload function. It will be enabled when the Participant List is active. It has a tool tip text of "Assigned Caseload".



**Figure 8 - Assigned Caseload Toolbar Button**

#### ***7.2.9.6 Clinic (or Agency) Caseload Toolbar Button***

This toolbar button will have interchangeable labels and functionality determined by the count of Agencies in the Agency table. If the system determines that one agency exists in the Agency table, this toolbar button allows the user to invoke the clinic caseload function. It will have a tool tip text of "Clinic Caseload". Otherwise, this toolbar button allows the user to invoke the agency caseload function and it has a tool tip text of "Agency Caseload". This toolbar button will be enabled when the Participant List window is active.



**Figure 9 - Clinic (or Agency) Caseload Toolbar Button**

#### ***7.2.9.7 County Caseload Toolbar Button***

This toolbar button allows the user to invoke the county caseload function. This toolbar button will be enabled when the Participant List window is active. It has a tool tip text of "County Caseload."



**Figure 10 - County Caseload Toolbar Button**

#### ***7.2.9.8 Open Participant Folder Toolbar Button***

This toolbar button allows the user to open a participant's folder. This toolbar button will be enabled when the Participant List Window is active and a participant record is selected on the participant list. It has a tool tip text of "Open Participant Folder."



**Figure 11 - Open Participant Folder Toolbar Button**

### **7.2.10 Toolbar Processing**

Upon selecting the System Outputs toolbar button, the Generate Reports dialog defined in [State Office Chapter 08 – System Outputs](#) is invoked.

Upon selecting the System Tools toolbar button, the system will expand the sub-menu as follows:

- System Tools
  - Change Password (mnemonic of 'P')

Upon selection of the Change Password menu item, the Set Password dialog defined in Application Administration - [Chapter 2 – Security](#) is invoked.
  - Set Default Printers (mnemonic of 'D')

Upon selection of the Set Default Printers menu item, the Default Printers dialog defined in Common Interface Panels [Chapter S - System Tools](#) is invoked
- Upon selection of the Exit toolbar button, the system will close and exit the State Office Application.
- Upon selection of the Assigned Caseload toolbar button
  - The system checks the permissions for the logged-on user. If the user does not have the Caseload. View, Add or FullControl, a standard error dialog is invoked with the text, "You do not have the necessary permissions to manage caseload. Please see the supervisor."
  - If the user does have the appropriate permission, the Assigned Caseload dialog defined in [Chapter 11 - Caseload Assigned](#) is invoked.
- Upon selection of the Clinic (or Agency) Caseload toolbar button
  - The system checks the permissions for the logged-on user. If the user does not have the Caseload. View, Add or FullControl, a standard error dialog is invoked with the text, "You do not have the necessary permissions to manage caseload. Please see the supervisor."
  - If the user does have the appropriate permission, the Clinic (or Agency) Caseload dialog defined in [Chapter 10 - Caseload Management](#) is invoked.
- Upon selection of the County Caseload toolbar button
  - The system checks the permissions for the logged-on user. If the user does not have the Caseload. View, Add or FullControl, a standard error dialog is invoked with the text, "You do not have the necessary permissions to manage caseload. Please see the supervisor."
  - If the user does have the appropriate permission, the County Caseload dialog defined in [Chapter 10 - Caseload Management](#) is invoked.
- Upon selection of the Open Participant Folder toolbar button

- A check is performed to determine whether the logged-on user has at least View level access defined for any of the following features; Demographics, Height/Weight Blood, Risk Factors, Nutrition Education, Income History, Referrals, Benefit issuance, Food Prescriptions, SOAP Notes, Breastfeeding Notes, General Notes, VENA History, Health Information, Immunizations, Breastfeeding Contacts, Breastpump Management, or Certifications. When the user does not have the any above listed permissions, a standard error dialog is invoked with the text, "You do not have the necessary permissions to view the Participant Folder. Please see the supervisor."
- If the user has at least View level access defined for any of the following features, the system invokes the Participant Folder for the currently selected household member in read-only mode.
- The system checks the permissions for the user logged-on to determine the permission level for Displaying Alerts as defined in Common Interface Panels – [Chapter C - Display Alerts for Household Member](#), as well as the Alert type to display. The alerts is displayed as follows:
  - If the Alert is a protected alert and the user does not have the ProtectedAlert.View permission, the alert will not be displayed.
  - If the Alert is a protected alert and the user does have the ProtectedAlert.View permission, the alert is displayed
  - If the Alert is a non-protected alert and the user does not have the Alert.View permission, the non-protected alert will not be displayed.
  - If the Alert is non-protected alert and the user does have the Alert.View permission, the non-protected alert is displayed
  - If no alerts exist or the system determines the user does not have the permissions, the Display Alerts dialog will be bypassed.

### 7.3 Participant Folder

The Participant Folder is a view of information for the participant segmented into separate screens similar to the way a paper-based hanging file is separated by individual file folder tabs. A folder may be opened in one of several ways:

- double-clicking on an item in the Participant List
- selecting a participant from the Participant List and selecting the Open Participant Folder option on the Participant List menu
- selecting a participant from the Participant List and selecting the Open Folder toolbar button

The screenshot displays a software window titled "JOHN DOE - 1 Year(s) 9 Months 21 Days - WIC ID:00766315 Household ID:00008691". The interface includes a menu bar (File, Participant Activities, Document Imaging, Help) and a toolbar with icons for search, print, and other functions. Below the toolbar is a tabbed interface with tabs for Health Information, Nutrition Education, Referrals, Income History, Benefits History, Appointments, Demographics, Immunization, HT/WT/Blood, Food Prescription, Risk Factors, and VENA. The Demographics tab is active, showing a form for participant information. The form includes fields for Last Name (DOE), First Name (JOHN), MI, Birth Date (1/13/2008), Gender (Male), Address (12345 ANYSTREET), County (PONTOTOC), City (ADA), State (OK), ZIP (74820), Email, SSN, PMI # (99999999), WIC Category (Child), Mail Address (12345 ANYSTREET), City (FRANCIS), State (OK), ZIP (74844-0000), Homeless status, Date Verified, Fixed Nighttime Location, ID Proof (PENDING PROOF), Residency Proof (PENDING PROOF), Telephone 1 (555-555-5555), Telephone 2, Comment, Physically Present (Yes/No), Reason Not Present, Maiden Name, Last, First, MI, Migrant, Living with Foster Parent(s), Clinic Assigned (ADA WIC CLINIC), and Staff Member (SHIRLEY VASQUEZ). The bottom right corner shows the date and time: 11/3/2009 12:57 PM.

Figure 12 - Participant Folder



### 7.3.1 Initializing the Interface

Upon initial display, set the title bar text to "Member.FirstName  
Member.MiddleInitial Member.LastName – [Descriptive Value of Age](#) – WIC  
ID: Member.StateWICID Household ID: Member.HouseholdID"

Descriptive Value of Age
For 'Infant' display 'XX' Months 'XX' Days, calculated from the Date of Birth.
For 'Child' display 'XX' Year(s) 'XX' Months 'XX' Days calculated from the Date of Birth
For 'Pregnant' display 'XX' weeks gestation calculated from LMP
For 'Breastfeeding' and 'Non-breastfeeding' display 'XX' Years calculated from the Date of Birth

- If the participant or a member of the participant's household is flagged for an Alert, upon opening the participant's folder, the system will automatically invoke the Display Alerts dialog defined in the Common Interfaces Panels – [Chapter C – Display Alerts for Household Member](#). However, the Delete Alert button will not be visible. Deleting an alert is not allowed when the dialog is displayed in State Office mode.

- The default tab displayed when the Participant Folder is opened will be the first available tab for which the user is granted permission. Refer to Security. The controls on the tab will be locked and the values cannot be modified. When the user permissions are 'None' for a tab, the tab is disabled and not available for selection. The following is a list of folder tabs available and the order in which the default and user permissions are verified when a participant folder is open:

Tab
Demographics
Height/Weight/Blood (HT\WT\Blood)
VENA
Risk Factors
Food Prescription
Nutrition Education
Benefits History
Immunizations
Referrals
Health Information tab [Infant/Child]
Health Information tab [Woman]
Income History
Appointments
Certification History (if the <a href="#">CLN_ShowCertificationHistory</a> business rule is set to "Y")

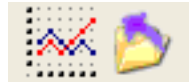
- Once a folder is opened, depending on the WIC category of the participant (or applicant) the folder will enable only those tabs and controls that apply to only the WIC Category of the participant. Refer to the respective tabs for specific information on Participant Folder tabs and sub-tabs.

### 7.3.2 Edits (Participant Folder)

Data may not be modified in the Participant Folder in the State Office application. The information displayed is view-only.

### 7.3.3 Toolbar Exceptions

In addition to the system toolbar options, when the Participant Folder is active several additional toolbar options are available.



**Figure 13- Participant Folder Toolbar**

#### 7.3.3.1 *Print Participant Summary Toolbar Button*

This toolbar button allows the user to produce the Participant Summary Report defined in [System Outputs Chapter 01 – System Outputs](#) for the participant whose Participant Folder is displayed. The toolbar button will be enabled when the Participant Folder is active. It has a tool tip text of "Print Participant Summary".



**Figure 14- Print Participant Summary Toolbar Button**

#### 7.3.3.2 *Close Participant Folder Toolbar Button*

This toolbar button allows the user to close the Participant Folder and return to the participant list. The toolbar button will be enabled when the Participant Folder is active. It has a tool tip text of "Close Participant Folder".



**Figure 15- Close Participant Folder Toolbar Button**

### 7.3.4 Processing

#### 7.3.4.1 *Print Participant Summary*

Upon selection of the Print Participant Summary toolbar button:

- If the participant does not have certification information the following message is displayed: "A certification attempt must exist on the system to produce a Participant Summary for the household member."
- If the participant has certification information, the Produce Participant Summary dialog defined in [System Outputs Chapter 01 – System Outputs](#) is invoked.

#### ***7.3.4.2 Close Participant Folder***

Upon selection of this option, the system closes the Participant Folder and returns to the Participant List. When the participant whose folder was opened still remains on that view of the Participant List, their record will be selected.

### ***7.4 Menu Exceptions***

In addition to the system menu options, when the Participant Folder is active, several additional menu items are available.

#### **7.4.1 Participant Activities Menu**

The menu will be enabled when the Participant Folder Window is active. Its mnemonic is "P". It will display the following Menu Items:

- Participant Activities
  - Print Participant Appointment Schedule
  - Breastfeeding
  - Review CPA-determined Follow-up Information
  - Work with Another Household Member
  - Manage Notes
  - Manage Alerts
  - Print Participant Summary
  - Close Participant Folder

##### ***7.4.1.1 Print Participant Appointment Schedule Menu Item***

The menu item will be enabled when the Participant Folder is active. Its mnemonic is "I".

##### ***7.4.1.2 Breastfeeding Menu Item***

The menu item will be enabled when the Participant Folder is active. Its mnemonic is "B".

##### ***7.4.1.3 Review CPA-determined Follow-up Information Menu Item***

The menu item will be enabled when the Participant Folder is active and the participant is in a valid certification period. Its mnemonic is "P".

##### ***7.4.1.4 Work with Another Household Member Menu Item***

The menu item will be enabled when the Participant Folder is active. Its mnemonic is "W".

##### ***7.4.1.5 Manage Notes Menu Item***

The menu item will be enabled when the Participant Folder is active. Its mnemonic is "N".

#### ***7.4.1.6 Manage Alerts Menu Item***

The menu item will be enabled when the Participant Folder is active. Its mnemonic is "L".

#### ***7.4.1.7 Print Participant Summary Menu Item***

The menu item will be enabled when the Participant Folder is active. Its mnemonic is "R".

#### ***7.4.1.8 Close Participant Folder Menu Item***

The menu item will be enabled when the Participant Folder is active. Its mnemonic is "C". (See Processing for [Close Participant Folder Toolbar Button](#))

### **7.4.2 Participant Activities Menu Items Processing**

#### ***7.4.2.1 Print Participant Appointment Schedule***

Upon selection of the Print Participant Appointment Schedule menu item, the Generate Participant Appointment Schedule dialog defined in Clinic Chapter 08 – Appointment Scheduling is invoked.

#### ***7.4.2.2 Breastfeeding***

Upon selection of the Breastfeeding menu item, the system will display the following menu items:

- Item Issuance History (mnemonic of 'H')
- Peer Counselor Contacts (mnemonic of 'B')

##### ***7.4.2.2.1 Item Issuance History***

Upon selection of the Item Issuance History menu item, if the user does not have the appropriate permissions (BreastfeedingItemIssuance.View, Add or FullControl), a standard error dialog is invoked with the text, "You do not have the necessary permissions to manage breastfeeding supplies. Please see the supervisor."

If the user has permission, the system will display the Breastfeeding Item Issuance History dialog defined in this chapter.

##### ***7.4.2.2.2 Peer Counselor Contacts***

Upon selection of the Breastfeeding Peer Counselor Contacts menu item, if the user does not have the appropriate permissions (BreastfeedingContacts.View, Add or FullControl), a standard error dialog is invoked with the text, "You do not have the necessary permissions to view breastfeeding peer counselor contact information. Please see the supervisor."

If the user has permission, the Breastfeeding Peer Counselor Contacts dialog defined in this chapter is invoked.

#### *7.4.2.3 Review CPA-determined Follow-up Information*

Upon selection of the Review CPA-determined Follow-up Information menu item, if the user does not have the appropriate permissions (CPAFollowUp.FullControl), a standard error dialog is invoked with the text, "You do not have the necessary permissions to update CPA-determined follow-up information. Please see the supervisor."

If the user has permission, the CPA -determined Follow-up dialog defined in this chapter is invoked.

#### *7.4.2.4 Work with Another Household Member*

Upon selection of the Work with Another Household Member menu item, a check is performed for additional household members. If there are no other household members associated with the selected participant's household ID, a standard error dialog is invoked with the text, "No additional members exist for this household." Upon dismissing the message, the system will return to the participant's folder.

If additional members are found with the associated household ID, the [Work with Another Household Member \(Participant Folder\)](#) dialog defined in Common Interface Panels Chapter B – Work with Another Household Member is invoked.

#### *7.4.2.5 Manage Notes*

Upon selection of the Manage Notes menu item, the View Notes for Household Member dialog defined in this document is invoked.

#### *7.4.2.6 Manage Alerts*

Upon selection of the Manage Alerts menu item, the Alerts list for Household dialog defined in this document is invoked.

#### *7.4.2.7 Print Participant Summary*

Upon selection of the Print Participant Summary menu item

- If the participant does not have certification information the following message is displayed: "A certification attempt must exist on the system to produce a Participant Summary for the household member."
- If the participant has certification information, the Produce Participant Summary dialog defined in [System Outputs Chapter 01 – System Outputs](#) is invoked.

#### *7.4.2.8 Close Participant Folder*

Upon selection of the Close Participant Folder menu item, the system closes the Participant Folder and returns to the Participant List. When the participant whose folder was opened still remains on that view of the Participant List, their record will be selected.

### **7.4.3 Document Imaging Menu**

The menu will be enabled when the Participant Folder is active. Its mnemonic is "D". It will display the following Menu Items:

- Scan a Document
- View Scanned Documents

### **7.4.4 Menu Items**

#### *7.4.4.1 Scan a Document*

The menu item is disabled when the Participant Folder is active. Its mnemonic is "S".

#### *7.4.4.2 View Scanned Documents*

The menu item will be enabled when the Participant Folder is active. Its mnemonic is "V".

### **7.4.5 Document Imaging Menu Processing**

#### *7.4.5.1 View Scanned Documents*

Upon selection of the View Scanned Documents sub-menu, the system checks the permissions for the currently logged-on user to determine if they have the DocumentImaging.View permission. If the user does not have appropriate permissions, a standard error dialog is invoked with the text, "You do not have the necessary permissions to view scanned documents. Please see the supervisor." If the user does have the DocumentImaging.View permission, the system will display the Scanned Documents dialog defined in this document

## 7.5 Scanned Documents

The Scanned Documents Dialog allows the user to view scanned documents. It is invoked when the user selects Document Imaging ->View Scanned Documents menu from the Participant Folder

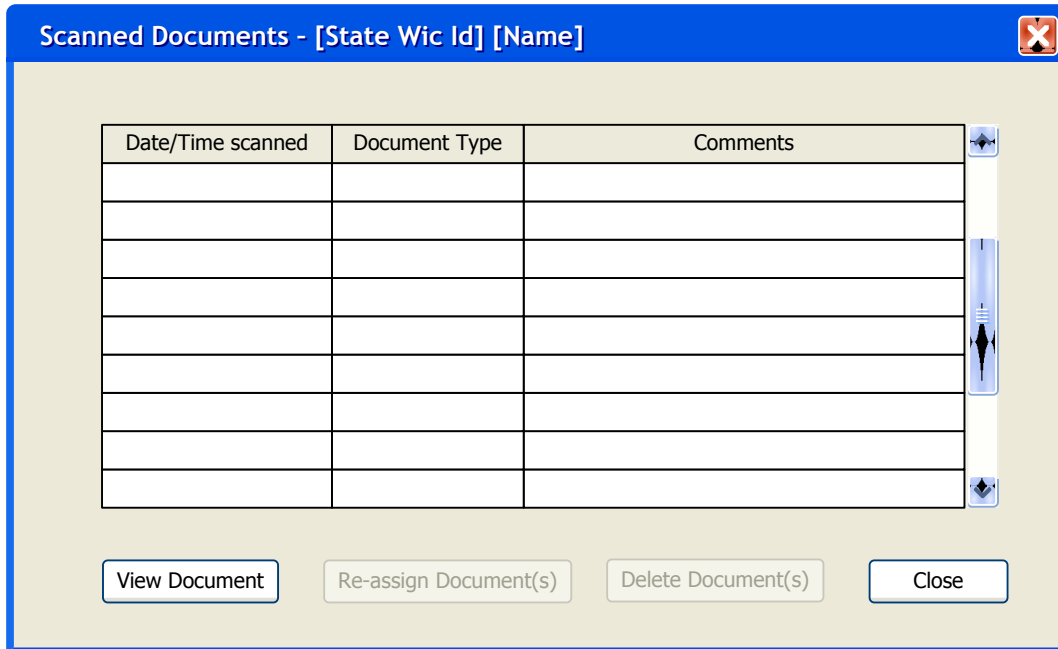


Figure 16 –Scanned Documents Dialog

### 7.5.1 Controls

The common controls for this dialog are defined in Clinic - [Chapter 14 - Document Imaging](#).

### 7.5.2 Processes

#### 7.5.2.1 Initializing the Interface

Upon initial display of the Scanned Documents dialog:

- The Re-assign Document(s) and Delete Document(s) buttons are disabled.



## 7.6 Breastfeeding Item Issuance History

The Breastfeeding Item Issuance History dialog allows the user to view the breastfeeding items that have been issued to the current participant. It is invoked when the user selects Breastfeeding > Item Issuance History menu item when the Participant Folder is active.

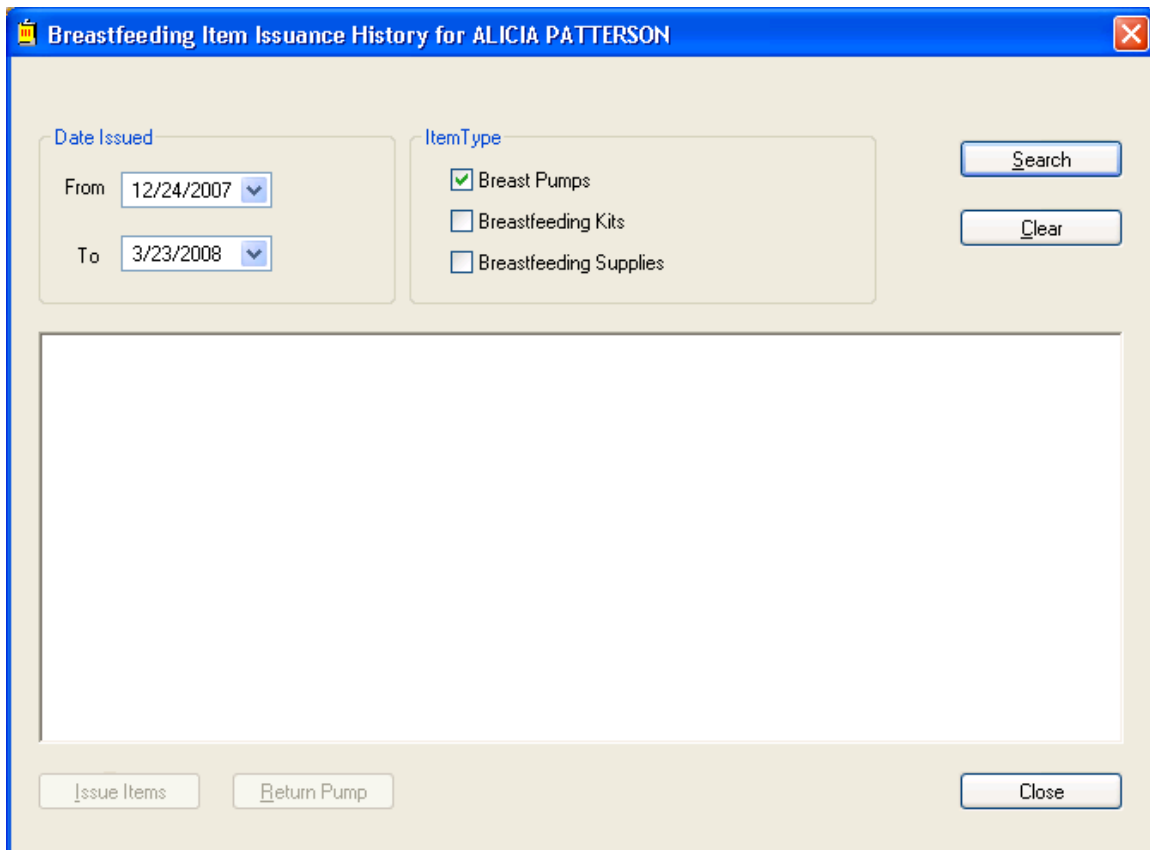


Figure 17 – Breastfeeding Item Issuance History Dialog

### 7.6.1 Controls

The common controls for this dialog are defined in Common Interface Panels - [Chapter P - Breastpumps, Breastfeeding Kits and Supplies](#).

### 7.6.2 Processes

#### 7.6.2.1 Initializing the Interface

Upon initial display of the Breastfeeding Item Issuance History dialog:

- The Issue Items and Return Pump buttons are disabled.

## 7.7 Breastfeeding Peer Counselor Contacts

The Breastfeeding Peer Counselor Contacts dialog allows the user to view previous breastfeeding peer counselor contacts with the participant. It is displayed when the user selects the Participant Activities > Breastfeeding > Peer Counselor Contacts menu item from the Participant Folder.

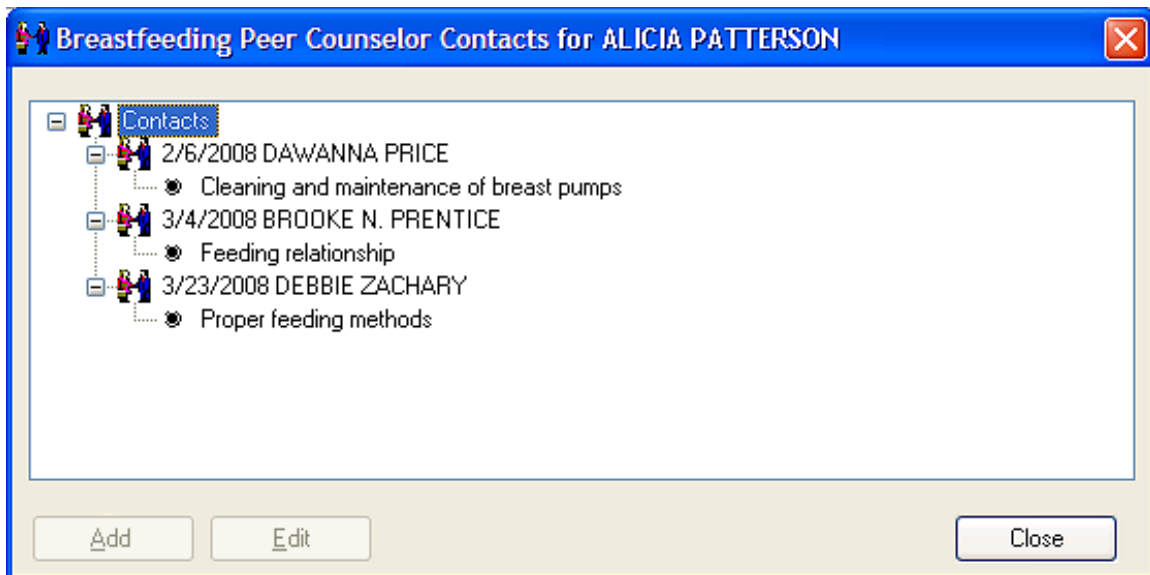


Figure 18 – Breastfeeding Peer Counselor Contacts Dialog

### 7.7.1 Controls

The common controls for this dialog are defined in Common Interface Panels - [Chapter Q - Breastfeeding Peer Counselor Contacts](#).

### 7.7.2 Processes

#### 7.7.2.1 Initializing the Interface

Upon initial display of the Breastfeeding Peer Counselor Contacts dialog:

- The Add and Edit buttons are disabled.

## 7.8 CPA-determined Follow-up

The CPA-determined Follow-up window allows the user to review follow-up information for the participant.

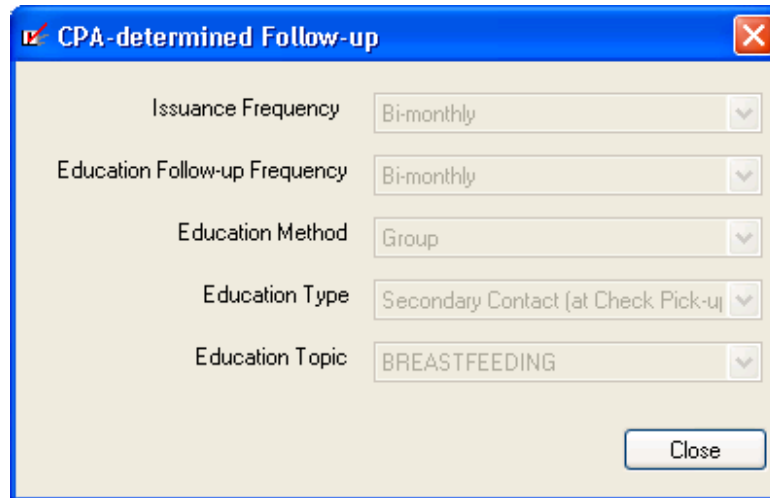


Figure 19 - CPA-determined Follow-up Dialog

### 7.8.1 Controls

The common controls for this dialog are defined in Common Interface Panels - [Chapter O - CPA Determined Follow-up](#).

#### 7.8.1.1 Close Button

The Close button will be enabled when the CPA-determined Follow-up window is active. Characteristics for the Close button are defined in Consistencies.

### 7.8.2 Processes

#### 7.8.2.1 Initializing the Interface

Upon initial display of the dialog:

- The Issuance Frequency drop-down is disabled.
- The Education Follow-up Frequency drop-down is disabled.
- The Education Method drop-down is disabled.
- The Education Type drop-down is disabled.
- The Education Topic drop-down is disabled.
- The OK and Cancel buttons are hidden.

## 7.9 View Notes for Household Member

The View Notes dialog allows the user to view previously created notes for the currently selected household member. The View Notes dialog is invoked when the user selects the [Manage Notes](#) list item from the Participant Activities menu.

Note Type	Date Created	Application Area	Staff Member
SOAP	2/4/2008	Certification	DPRICE
SOAP	9/26/2007	Demographics	DPRICE
SOAP	9/26/2007	Demographics	DPRICE
SOAP	7/19/2007	Food Prescription	DPRICE
SOAP	6/12/2007	Height/Weight	DPRICE

S:RC-CHILD, DISC R & R , DISC GROWTH CHART, DISC EATING HABITS OF CHILD, DISC DENTAL CARRIES OF DRINKING AFTER PARENT OR ANYONE ELSE, DISC HEALTHY SNACKS, DISC CHOKING HAZARDS , HOT DOGS, WHOLE GRAPES, PEANUTS , PEANUT BUTTER

O:  
2/4/2008 28 inches 0/8 inches 20 pounds 1 ounces. Height for age percentile: 30.61% Weight for age percentile: 45.78%

Figure 20 - View Notes Dialog

### 7.9.1 Controls

The common controls for this dialog are defined in Clinic - [Chapter 9 - Participant Folder](#).

### 7.9.2 Processes

#### 7.9.2.1 Initializing the Interface

Upon initial display of the dialog:

- The Create SOAP Note button is disabled.
- The Create General Note button is disabled.
- The Create Breastfeeding Note button is disabled.

## 7.10 Alerts List for Household

The Alerts List for Household dialog allows the user to view the alerts defined for the currently selected household member and other members of the household. The user can also add, edit, or delete alerts for the household members. The Alerts List for Household dialog is invoked when the user selects the [Manage Alerts](#) menu item from the Participant Activities menu.

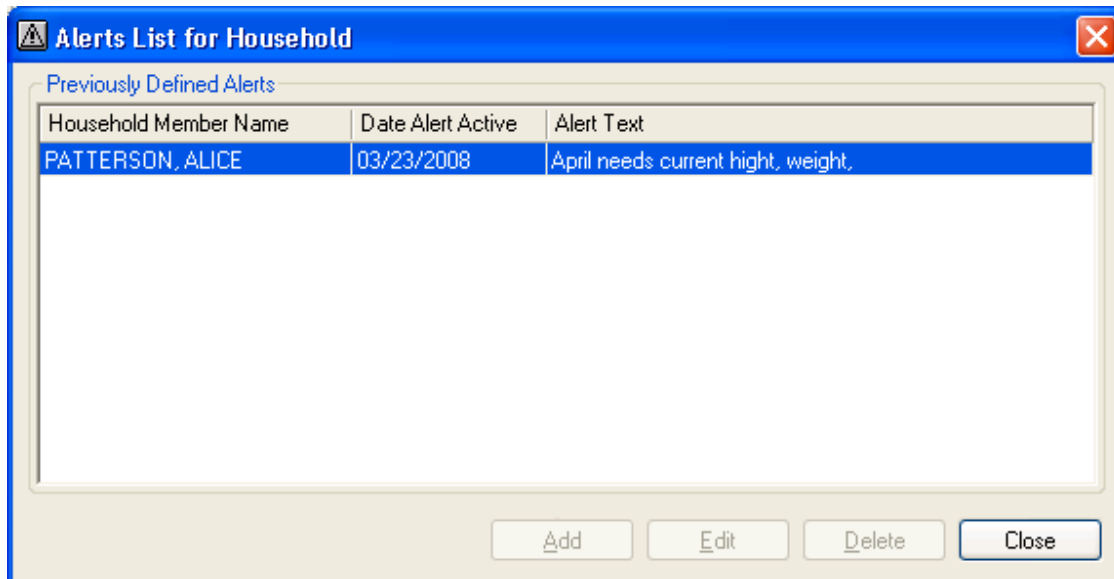


Figure 21 - Alerts List for Household Dialog

### 7.10.1 Controls

The common controls for this dialog are defined in Clinic - [Chapter 9 - Participant Folder](#).

### 7.10.2 Processes

#### 7.10.2.1 Initializing the Interface

Upon initial display of the dialog:

- The Add button is disabled.
- The Edit button is disabled.
- The Delete button is disabled.

## 7.11 Manage Consigned Breastpumps

The Manage Consigned Breastpumps dialog allows the user to view breastpump inventory items consigned to the clinic. It is invoked when the user selects the Manage Consigned Breastpumps menu item on the Activities menu from the Participant List.

**Manage Consigned Breastpumps**

Clinic: 01 - Smithville WIC Clinic

Product: Ameda Nuture III Dual Pumping Breastpump Multiple-Use Electric

Disposition: Consigned

Serial Number:

Search

Clear

Product Description	Serial No	Disposition	Date
Ameda Nuture III Dual Pumping Breastpump Multiple-Use Electric	123456789012345679		
Ameda Nuture III Dual Pumping Breastpump Multiple-Use Electric	123456789012345680		
Ameda Nuture III Dual Pumping Breastpump Multiple-Use Electric	123456789013245681		

Loan Breastpump Return Breastpump Retire Breastpump Close

Figure 22 – Manage Consigned Breastpumps Dialog

### 7.11.1 Controls

This section describes the behavior of the controls on the Manage Consigned Breastpumps dialog.

#### 7.11.1.1 Clinic Drop-down List

The control allows the user to select a clinic from a list of clinic inventory locations stored in the system. The drop-down will be enabled when the Manage Consigned Breastpumps dialog is active. It will display a list of clinic names from the ServiceSite table for each clinic. The clinics are bridged to InventoryLocation through the Location table. The list will appear in alphabetic order. No entry will be initially selected. A selection is required in this control.

#### ***7.11.1.2 Product Drop-down List***

The control allows the user to select a product from a list of all products stored on the system. The drop-down will be enabled when the Manage Consigned Breastpumps dialog is active. It will display a list of product descriptions concatenated from the Manufacturer, ManufacturerBrand, and ManufacturerBrandType tables plus the descriptions from the ReferenceDictionary for 'INVPDCTSUBCLASSUSE' and 'INVPDCTSUBCLASSTYP' for each product in the Inventory Item table with an inventory location matching the selected clinic inventory location and a product class of BF (breastfeeding inventory) and a subclass of 'P' (breastpump) and the inventory item is a trackable asset. The list will appear in alphabetic order. No entry will be initially selected. The list will appear in alphabetic order. No entry will be initially selected. A selection is required in this control.

#### ***7.11.1.3 Disposition Drop-down List***

The control allows the user to select the current disposition of the selected breastfeeding inventory item. The drop-down will be enabled when the Manage Consigned Breastpumps dialog is active. It will display all ReferenceDictionary.Description where the ReferenceDictionary.Category = 'INVITEMSTATUS'. The list is displayed in alphabetic order. A selection is required from the list.

#### ***7.11.1.4 Serial Number Masked Edit Box***

The control allows the user to enter a serial number or part identifier for the specific item stored in inventory. The control is enabled when the Manage Consigned Breastpumps dialog is active. The control allows entry of twenty (20) alphanumeric characters.

#### ***7.11.1.5 Breastpump Inventory Items Grid***

The control allows the user to manage breastpump inventory items consigned to a clinic. The grid will be enabled when the Manage Consigned Breastpumps dialog is active. It consists of the following columns:

- Product Description (Manufacturer/Brand/Type/SubClass Use and SubClass Type)
- Serial Number (InventoryItem.SerialNbr)
- Disposition (InventoryItem Status)
- Date (InventoryItem StatusDate)
- Location (InventoryItem.LoanedLocationDescription)
- ProductID (Non-display InventoryItem.ProductId)

The grid will be filled with entries for breastpump inventory items based on the selection criteria. The entries will be sorted alphabetical order. The values in the control will be read-only.

Breastpump Inventory will be determined by examining the InventoryItem table for products in the Product table meeting the following criteria:

- Class equal to 'BF'
- Subclass equal to 'P'

#### ***7.11.1.6 Loan Breastpump Button***

The control allows the user to loan a breastpump to a location. The Loan Breastpump button will be enabled when the selected grid item is a trackable asset with a disposition of "Consigned". Its mnemonic is "L".

#### ***7.11.1.7 Return Breastpump Button***

The control allows the user to record that a breastpump was returned from a location. The Return Breastpump button will be enabled when the selected grid item has a disposition of "Loaned". Its mnemonic is "R".

#### ***7.11.1.8 Retire Breastpump Button***

The control allows the user to record that a breastpump was retired or pulled from inventory. The Retire Breastpump button will be enabled when the selected grid item has a disposition of "Consigned". Its mnemonic is "T".

#### ***7.11.1.9 Close Button***

The control allows the user to exit the Manage Consigned Breastpumps dialog. The Close button will be enabled when the Manage Consigned Breastpumps dialog is active. It does not have a mnemonic and is the default button and the cancel button for the window.

### **7.11.2 Processes**

This section describes the processes (navigation) that take place as a result of the actions taken on the Manage Consigned Breastpumps dialog.

#### ***7.11.2.1 Initializing the Interface***

Upon initial display of the Manage Consigned Breastpumps dialog:

- The title bar text will be set to "Manage Consigned Breastpumps".
- The Breastpump Inventory Item display grid will be filled with an entry for each breastpump meeting the selection criteria.
  - Product Description (Manufacturer/Brand/Type/SubClass Use and SubClass Type)
    - Manufacturer (Manufacturer Name)
    - Brand (ManufacturerBrand BrandName)
    - Pump Type (ManufacturerBrandType Description)
    - Subclass Use (INVPDCTSUBCLASSUSE')
    - Subclass Type (INVPDCTSUBCLASSTYPE')



- Serial Number (InventoryIssued SerialNbr)
- Disposition (InventoryItem Status)
- Date (InventoryItem StatusDate)
- Location (InventoryItem.LoanedLocationDescription)
- ProductID (Non-display)

#### **7.11.2.2 Edits**

There are no updateable controls on the Manage Consigned Breastpumps dialog; therefore, no edits are performed.

#### **7.11.2.3 Saving the Data**

There are no updateable controls on the Manage Consigned Breastpumps dialog; therefore, no data is written to the database.

#### **7.11.2.4 Loan Breastpump**

Upon selection of the Loan Breastpump button:

- A check is performed to determine whether the logged-on user has the appropriate permissions to update breastpump information. If the user does not have the appropriate permissions, a standard error dialog is invoked with the text, "You do not have the necessary permissions to update breastpump information. Please see the supervisor."
- If the user has permissions to perform the Loan Breastpump function, the [Loan Breastpump to Location](#) dialog is invoked.
- The selected grid item must be a trackable asset with a disposition of "Consigned."

#### **7.11.2.5 Return Breastpump**

Upon selection of the Return Breastpump button:

- A check is performed to determine whether the logged-on user has the appropriate permissions to update breastpump information. If the user does not have the appropriate permissions, a standard error dialog is invoked with the text, "You do not have the necessary permissions to update breastpump information. Please see the supervisor."
- If the user has permissions to perform the Return Breastpump function, the [Confirm Breastpump Returned from Location](#) dialog is invoked.
- The selected grid item must be a trackable asset with a disposition of "Loaned".

#### **7.11.2.6 Retire Breastpump**

Upon selection of the Retire Breastpump button:

- A check is performed to determine whether the logged-on user has the appropriate permissions to update breastpump information. If the user does not have the appropriate permissions, a standard error dialog is invoked with the text, "You do not have the necessary permissions to update breastpump information. Please see the supervisor."
- If the user has permissions to perform the Retire Breastpump function, a standard confirmation dialog is invoked with the text, "Are you sure you want to pull this item out of inventory?"
- The selected grid item must be a trackable asset with a disposition of "Consigned."

## 7.12 Loan Breastpump to Location

The Loan Breastpump to Location dialog allows the user to loan a multiple-use breastpump to a specific location. It is invoked when the user selects the Loan Breastpump button on the [Manage Consigned Breastpumps](#) dialog.



Figure 23 – Loan Breastpump to Location Dialog

### 7.12.1 Controls

This section describes the behavior of the controls on the Loan Breastpump to Location dialog.

#### 7.12.1.1 Consigned To Text and Value Label

The control allows the user to view the inventory location the breastpump is currently consigned to.

#### 7.12.1.2 Product Text and Value Label

The control allows the user to view the manufacturer, brand, type, and subclass use/type of the breastpump that was loaned. It will display the product description concatenated from the Manufacturer, ManufacturerBrand, and ManufacturerBrandType tables for the product in the product table plus the descriptions for the subclass use and subclass type from the ReferenceDictionary for 'INVPDCTSUBCLASSUSE' and 'INVPDCTSUBCLASSTYP'.

#### 7.12.1.3 Serial Number Text and Value Label

The control allows the user to enter the identification number for the breastpump that was loaned.

#### 7.12.1.4 Date Loaned Calendar Date Control

The control allows the user to enter the date the breastpump was loaned to the location. The calendar date control will be enabled when the Loan Breastpump to Location dialog is active. It will only accept entry of numeric digits. The mask on the box will be "####/####/####" to accept a date with a four digit year.

#### **7.12.1.5 Location Text Box**

The control allows the user to enter where the breastpump will be located. The text box will be enabled when the Loan Breastpump to Location dialog is active. It allows the entry of alphabetic characters, spaces, and the following special characters: { ' , - }. The maximum length allowed for the value is eighty (80) characters.

#### **7.12.1.6 OK Button**

The control allows the user to save the loaned breastpump information. The OK button will be enabled when the Loan Breastpump to Location dialog is active. Characteristics for the OK button are defined in Consistencies.

#### **7.12.1.7 Cancel Button**

The control allows the user to exit the Loan Breastpump to Location dialog. The Cancel button will be enabled when the Loan Breastpump to Location dialog is active. Characteristics for the Cancel button are defined in Consistencies.

### **7.12.2 Processes**

This section describes the processes (navigation) that take place as a result of the actions taken on the Loan Breastpump to Location dialog.

#### **7.12.2.1 Initializing the Interface**

Upon initial display of the Loan Breastpump to Location dialog:

- The title bar text will be set to "Loan Breastpump to Location".
- The Consigned To label will be set to the inventory location for the clinic.
- The serial number label will be set to the serial number of the selected breast pump.
- The Date Loaned calendar date control defaults to the current system date.
- The following controls will be initially blank:
  - Location text box

#### **7.12.2.2 Edits**

Upon selection of the OK button The system invokes a standard error message with the text, "An entry is required in the {control label}" if an entry is not made in the following:

- Date Loaned calendar date control
- Location text box

#### ***7.12.2.3 Saving the Data***

Upon successful completion of the above-listed edits, the system will save the values to the database as defined in the Data Map below. The system will return to the calling dialog.

#### ***7.12.2.4 Cancel***

Upon selection of the Cancel button, the system will dismiss the Loan Breastpump to Location dialog and return to the calling dialog.

#### ***7.12.2.5 Data Map***

<b>Control Label</b>	<b>Table</b>	<b>Column</b>	<b>Business Rule Applicable</b>
Date Loaned	InventoryItem	StatusDate	
	InventoryItem	Set Status to L=Loaned	
Location	InventoryItem	LoanedLocation	
	InventoryItemHistory	Add a row to history for each add/update of the inventory item	Trackable Products Only

### 7.13 Confirm Breastpump Returned from Location

The Confirm Breastpump Returned from Location dialog allows the user to record that the loaner breastpump was returned. It is invoked when the user selects the Return Breastpump button on the [Manage Consigned Breastpumps](#) dialog.

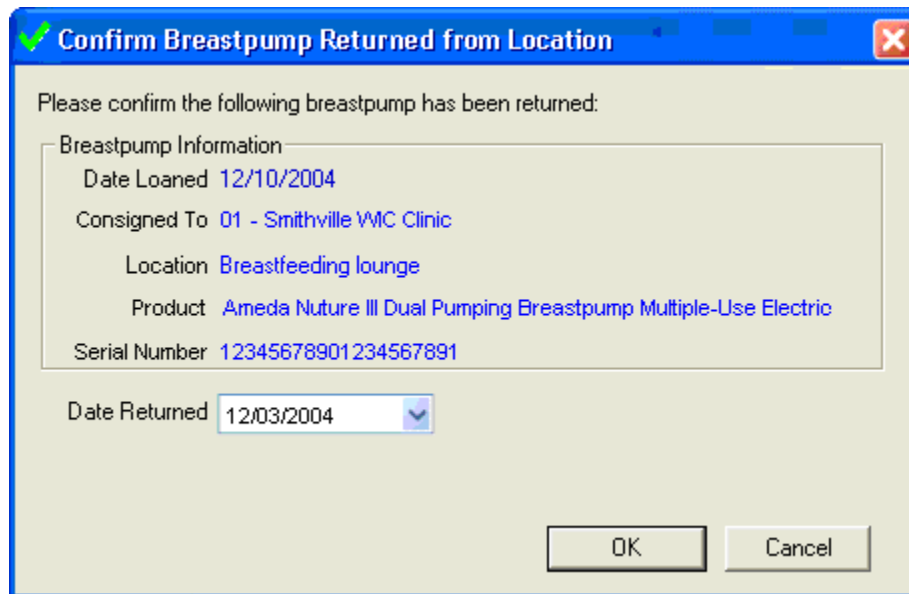


Figure 24 – Confirm Breastpump Returned from Location Dialog

#### 7.13.1 Controls

This section describes the behavior of the controls on the Confirm Breastpump Returned from Location dialog.

##### 7.13.1.1 Date Loaned Text and Value Label

The control allows the user to view the date the breastpump was loaned to the location. The value label will display in the inverse color of the form.

##### 7.13.1.2 Consigned To Text and Value Label

The control allows the user to view the inventory location the breastpump is currently consigned to.

##### 7.13.1.3 Location Text and Value Label

The control allows the user to view where the breastpump was located. The value label will display in the inverse color of the form.

#### ***7.13.1.4 Product Text and Value Label***

The control allows the user to view the manufacturer, brand, type, and subclass use/type of the selected breastpump. It will display the product description concatenated from the Manufacturer, ManufacturerBrand, and ManufacturerBrandType tables for the product in the product table plus the descriptions from the ReferenceDictionary for 'INVPDCTSUBCLASSUSE' and 'INVPDCTSUBCLASSTYP'. The value label will display in the inverse color of the form.

#### ***7.13.1.5 Serial Number Text and Value Label***

The control allows the user to view the identification number for breastpump that was loaned. The value label will display in the inverse color of the form.

#### ***7.13.1.6 Date Returned Calendar Date Control***

The control allows the user to enter the date the breastpump was returned. The calendar date control will be enabled when the Confirm Breastpump Returned from Location dialog is active. It will only accept entry of numeric digits. The mask on the box will be "###/###/####" to accept a date with a four digit year.

#### ***7.13.1.7 OK Button***

The control allows the user to save the returned breastpump information. The OK button will be enabled when the Confirm Breastpump Returned from Location dialog is active. Characteristics for the OK button are defined in Consistencies.

#### ***7.13.1.8 Cancel Button***

The control allows the user to exit the Confirm Breastpump Returned from Location dialog. The Cancel button will be enabled when the Confirm Breastpump Returned from Location dialog is active. Characteristics for the Cancel button are defined in Consistencies.

### **7.13.2 Processes**

This section describes the processes (navigation) that take place as a result of the actions taken on the Confirm Breastpump Returned from Location dialog.

#### ***7.13.2.1 Initializing the Interface***

Upon initial display of the Confirm Breastpump Returned from Location dialog:

- The title bar text will be set to "Confirm Breastpump Returned from Location".
- The Date Returned calendar date control defaults to the current system date.

### 7.13.2.2 Edits

Upon selection of the OK button The system invokes a standard error message with the text, "An entry is required in the {control label}" if an entry is not made in the following:

- Date Returned calendar date control

### 7.13.2.3 Saving the Data

Upon successful completion of the above-listed edits, the system will save the values to the database as defined in the Data Map below. The system will return to the calling dialog.

### 7.13.2.4 Cancel

Upon selection of the Cancel button, the system will dismiss the Confirm Breastpump Returned from Location dialog and return to the calling dialog.

### 7.13.2.5 Data Map

Control Label	Table	Column	Business Rule Applicable
Date Returned	InventoryItem	StatusDate	
	InventoryItem	Set Status to C=Consigned	
	InventoryItem	LoanedLocation = null	
	InventoryItem	InventoryLocationID = the InventoryLocationID having a Location ID matching the Current Selected Location	
	InventoryItemHistory	Add a row to history for each add/update of the inventory item	Trackable Products Only



### 7.14 Record Replacement Item

The Record Replacement Item dialog allows the user to record that a replacement breastpump was shipped to a clinic from the manufacturer circumventing the order request/received processing to replace one that was damaged. The Record Replacement Item dialog is invoked when the user selects the [Record Replacement Item Menu Item](#) from the Activities menu. When accessing this process from the State Office, the system adjusts quantity on hand. When accessing this process from a Clinic, the system adjusts the consigned quantity for the location that is signed on.

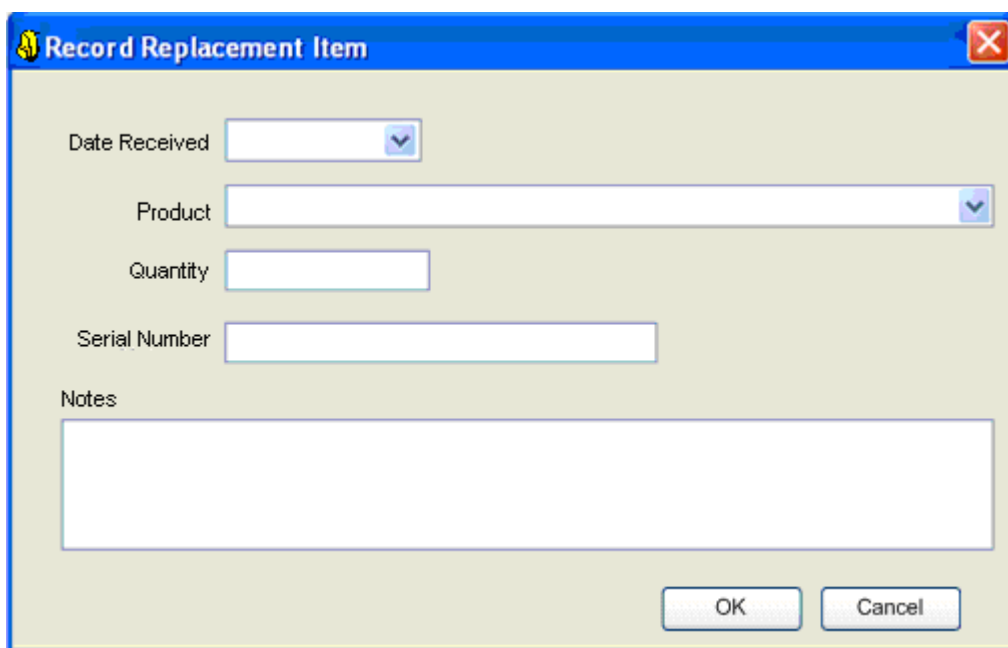
The image shows a software dialog box titled "Record Replacement Item". It has a standard Windows-style title bar with a yellow icon on the left and a red close button on the right. The dialog contains several input fields: "Date Received" with a calendar icon, "Product" with a dropdown arrow, "Quantity" with a text box, and "Serial Number" with a text box. Below these is a "Notes" section with a large text area. At the bottom right are "OK" and "Cancel" buttons.

Figure 25 - Record Replacement Item Dialog

#### 7.14.1 Controls

This section describes the behavior of the controls on the Record Replacement Item dialog.

##### 7.14.1.1 Date Received Calendar Date Control

The control allows the user to enter the date that the replacement breastpump was received. The calendar date control will be enabled when the Record Replacement Item dialog is active. It allows the entry of numeric characters. The mask for the box is "####/##/#####" to accept a date with a four digit year.

#### ***7.14.1.2 Product Drop-down***

The control allows the user to record the replacement inventory item. The drop-down will be enabled when the Record Replacement Item dialog is active. It will be filled with a list of products from the Product table displayed in alphabetic order. The product descriptions are concatenated from the Manufacturer, ManufacturerBrand, and ManufacturerBrandType tables plus the descriptions from the ReferenceDictionary for 'INVPDCTSUBCLASSUSE' and 'INVPDCTSUBCLASSTYP' for each product in the Inventory table with a product class of BF (breastfeeding inventory) and a subclass of 'P' (breastpump). The list will appear in alphabetic order. No entry will be initially selected.

Upon selecting a Product, the system will set the Quantity to 1. The system will verify if the product is a trackable asset. If yes, the system will disable the Quantity control and enable the S/N control. If no, the system will enable the Quantity control and disable the S/N control.

Upon a change in Product, the system will reset the Quantity and S/N accordingly.

#### ***7.14.1.3 Quantity***

The control allows the user to specify the quantity of items replaced. The Quantity control allows entry of up to 5 numeric digits. Alpha and special characters are not allowed. Note that when this control is disabled it does not get focus and it is not included in the tab order for the dialog.

#### ***7.14.1.4 Serial Number***

The control allows the user to specify the serial number, part number or unique identifier for the returned item. The serial number allows a maximum of 20 alphanumeric characters. Special characters are not allowed. Note that when this control is disabled it does not get focus and it is not included in the tab order for the dialog.

#### ***7.14.1.5 Notes Text Box***

The control allows the user to enter general notes about the replacement breastpump. The text box will be enabled when the Record Replacement Item dialog is active. When the text exceeds the bounds of the text box, a vertical scroll bar will display. The control allows up to 400 alphanumeric and special characters.

#### ***7.14.1.6 OK Button***

The OK button will be enabled when the Record Replacement Item dialog is active. Characteristics for the OK button are defined in Consistencies.

#### **7.14.1.7 Cancel Button**

The Cancel button will be enabled when the Record Replacement Item dialog is active. Characteristics for the Cancel button are defined in Consistencies.

### **7.14.2 Processes**

This section describes the processes (navigation) that take place as a result of the actions taken on the Record Replacement Item dialog.

#### **7.14.2.1 Initializing the Interface**

Upon initial presentation of the dialog:

- The title bar text will be set to "Record Replacement Item"
- The Date Received calendar date control defaults to the current system date.
- The Product drop-down will be initially blank.
- The Quantity field will be initially disabled and blank
- The serial number field will be initially disabled and blank.
- The Notes text box will be initially blank.

#### **7.14.2.2 Edits**

Upon selection of the OK button:

- If an entry is not made in the Date Received calendar date control  
The system invokes a standard error message with the text, "An entry is required in the {control label}".
- If a selection is not made in the Product drop-down, a standard error dialog is invoked with the text, "A selection is required in the {control label}".
- If the Quantity is enabled and is blank, a standard error dialog is invoked with the text, "An entry is required in the {control label}".
- If the serial number is enabled and is blank, a standard error dialog is invoked with the text, "An entry is required in the {control label}".
- If the serial number is entered and if an inventory item already exists in inventory for the same product, a standard error dialog is invoked with the text, "This {control label} has already been recorded for this product".

#### **7.14.2.3 Saving the Data**

Upon successful completion of the above-listed edits, the system will save the values to the database as defined in the Data Map below.

If accessing this process from a Clinic application:

- Insert a record into the InventoryReplacement table.
- Increment the InventoryConsigned.quantity by the quantity specified if the inventory exists or insert a record into the InventoryConsigned table for the quantity specified, consigning the inventory to the current clinic.
- If the product is a trackable asset, the system will insert a record into the InventoryItem table setting its status to 'consigned'.
- The system will return to the calling dialog.

If accessing this process from the State Office Manage Inventory application:

- Insert a record into the InventoryReplacement table
- If accessing this process from a clinic, increment the InventoryConsigned.quantity by the quantity specified.
- If accessing this process from State Office Manage Inventory, increment the Inventory.QuantityInStock by the quantity specified.
- If the product is a trackable asset:
  - The system will insert a record into the InventoryItem table setting its status to 'consigned'
  - The system will insert a record into the InventoryConsigned table, consigning the item to the current clinic.
- The system will return to the calling dialog.

#### 7.14.2.4 Cancel

Upon selection of the Cancel button, the system will dismiss the dialog without saving and return to the calling dialog.

#### 7.14.2.5 Data Map

Control Label	Table	Column	Business Rule Applicable
Date Received	InventoryReplacement	ReceivedDate	Trackable Products Only
Product	InventoryReplacement	ProductID	
Quantity	InventoryReplacement	Increase Quantity by Value	
Quantity	InventoryConsigned	Increase Quantity by Value for the InventoryLocationID having a Location ID matching the Current	

		Selected Location	
Location	InventoryConsignedTransactions	InventoryLocationID = the InventoryLocationID having a Location ID matching the Current Selected Location	
Quantity	InventoryConsignedTransactions	Quantity (quantity added for this transaction)	
	Add a new InventoryItem		Trackable Products Only
S/N	InventoryItem	SerialNbr	
Product	InventoryItem	ProductID	
	InventoryItem	Status = Consigned	
	InventoryItem	StatusDate = Today	
	InventoryItem	InventoryLocationID = the InventoryLocationID having a Location ID matching the Current Selected Location	
	InventoryItem	ConsignedDate = Today	
	InventoryItemHistory	Add a row to history for each add/update of the inventory item	Trackable Products Only

## 7.15 Confirm Retire Inventory Item

The Confirm Retire Inventory Item dialog allows the user to record that the selected inventory item was pulled out of inventory. The Confirm Retire Inventory Item dialog is invoked when the user selects the Retire Inventory button on the Manage Consigned Inventory dialog.

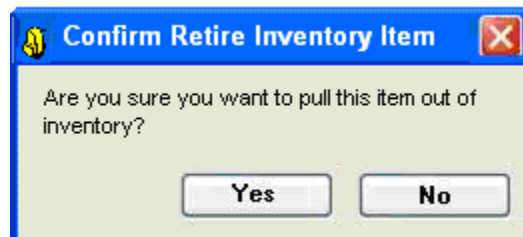


Figure 26 - Confirm Retire Inventory Item Dialog

### 7.15.1 Controls

This section describes the behavior of the controls on the Confirm Retire Inventory Item dialog.

#### 7.15.1.1 Yes Button

The control allows the user to retire a tracked inventory item. The YES button will be enabled when the Confirm Retire Inventory Item dialog is active.

#### 7.15.1.2 No Button

The control allows the user to exit the Confirm Retire Inventory Item dialog is active. The No button will be enabled when the Confirm Retire Inventory Item dialog is active. It is the default button.

### 7.15.2 Processes

This section describes the processes (navigation) that take place as a result of the actions taken on the Record Replacement Item dialog.

#### 7.15.2.1 Initializing the Interface

Upon initial presentation of the dialog:

- The title bar text will be set to "Confirm Retire Inventory Item"

#### 7.15.2.2 Edits

None

#### 7.15.2.3 Saving the Data

Upon successful completion of the above-listed edits, the system will update the inventory item in the database as defined in the Data Map below.

- The product is a trackable asset:

- The system will update the InventoryItem table setting its status to 'retired'.
- The system will return to the calling dialog.

#### **7.15.2.4 Yes**

Upon selection of the Yes button, the system will update the inventory item. The user will be returned to the calling dialog.

#### **7.15.2.5 No**

Upon selection of the No button, the system will dismiss the Complete Order dialog and return to the calling dialog.

#### **7.15.2.6 Data Map**

<b>Control Label</b>	<b>Table</b>	<b>Column</b>	<b>Business Rule Applicable</b>
Quantity	InventoryConsigned	Decrease Quantity by Value If it is a tracked inventory item then the quantity must be '1'	
	InventoryItem	Status = X=Retired	Trackable Products Only
	InventoryItem	StatusDate = Today	
	InventoryItemHistory	Add a row to history for each add/update of the inventory item	Trackable Products Only